

FEASIBILITY/PLANNING STUDY: **EXECUTIVE SUMMARY**

In March 2008, Sacred Heart Church in Bellevue, Washington, retained Guidance In Giving, Inc. to conduct a feasibility/planning study to help gauge parishioner enthusiasm for the Master Plan priorities and project the levels of financial and volunteer support for a major capital campaign. The four main projects constituting Priority 1 of the parish's Master Plan, emphasized for their *Safety and Security* benefits, were the primary focus of the Feasibility/planning study. Also tested were the Priority 2 and Priority 3 projects, the willingness of potential campaign leadership and leadership gift prospects and the parish's overall campaign financial potential. The findings from the parish feasibility/planning study form the basis of this report and the recommendations are based on the 30 years of experience of the executive staff in the field of Catholic parish and diocesan development.

The purpose of the feasibility/planning study was to assess parishioner readiness and enthusiasm for a capital campaign to fund the Master Plan developed by Sacred Heart's parish leadership. Additionally, the study enabled the firm to determine the methodology for a campaign and sample opinions regarding campaign leadership, general volunteers, project priorities and the level of personal giving to a prospective campaign, should the parish move forward following the presentation of the study findings.

An invitation from the pastor, Fr. Pat Ritter, was mailed to 138 parish households inviting these parishioners to participate in a personal interview. The interview list represented a cross-section of Sacred Heart's most active parishioners, school families and some of the parish's most financially supportive households, either to the offertory or other parish/archdiocesan fundraising efforts. In an effort to give every registered parishioner at Sacred Heart Parish the opportunity to share their input and opinions about the Master Plan and participate in this feasibility/planning study, a mail survey was sent to the 1,539 registered households that were not designated for a personal interview.

- **70 personal interviews were conducted—an above average result from the number invitations sent and an integral part of this process.**
- **198 households returned a completed mail survey; combined with the interviews these provided an excellent representative sampling of parishioners' views.**

Between the personal interviews and parishioners who responded to the mailing questionnaire, the average length of time the participants have been in the parish is 22 years.

This report is the culmination of the feasibility/planning study process and provides the parish with a considerable amount of information on prevailing parish-wide sentiments concerning the Priority 1 projects in the parish's Master Plan, the prospect of funding these projects through a capital campaign, and the level of volunteer and financial support for the projects outlined therein.

RECOMMENDATIONS

(The Parish Council, after careful consideration of the findings and professional recommendations in this report, has recommended that the parish share with parishioners more of the research that has been done over the past two years, regarding the Master Plan developed by the Steering Committee. Also, the Parish Council has recommended providing regular updates via the parish website, keeping parishioners informed of the campaign's progress.)

Based on the statistical results and analysis of the subjective responses received during the parish feasibility/planning study, and after thorough review by the executives of Guidance In Giving, Inc. the following recommendations are respectfully presented to the leadership of Sacred Heart Parish for review and consideration.

Guidance In Giving, Inc. recommends that the parish move forward with a capital campaign as planned to implement Priority 1 of the parish's Master Plan, taking into consideration the concerns and potential challenges outlined in this study. These concerns, while not prohibitive, relate to critical aspects of any future fundraising effort and include parishioner apprehension regarding the current economic climate.

I. POSITIVE RESPONSES LEAD STUDY

The figures below are representative of participants' responses for all questions relating to their reactions to the projects included in the Master Plan. In fact, the majority of those who did not answer "Positive" or "Yes" to these questions were either "Unsure" or left the question blank. Very few indicated a "Negative" response.

76% were either Very Positive or Positive regarding the capital needs as presented.

75% responded 'Yes', they would support the campaign.

67% responded 'Yes', they felt others would support the campaign.

II. ECONOMIC CONCERNS APPARENT

Acknowledging the potential hurdle posed by an uncertain economy, counsel stresses that the majority of study participants clearly are in favor of the Master Plan and indicated they will support a capital campaign. Parishioners' economic concerns, while pervasive, should not impact Sacred Heart Parish's timeline for a capital campaign and should not dramatically affect the parish's fundraising potential. Essentially it is worth taking note of and acknowledging the challenges parishioners face. Many parishioners, in tandem with their stated concerns, also recognized that there is seldom a "good" time for a capital campaign. *In addition, the clear majority of the parishioners interviewed believe there are parishioners at Sacred Heart with the inclination and financial resources necessary for a successful, silent Leadership Gifts Phase, required to help set the pace for the success of the campaign overall.*

III. CAMPAIGN TIMELINE

The timeframe for the campaign is critical. The current plan is for the parish to begin all of the campaign preparation work and also begin the Leadership Gifts Phase immediately following the completion of a positive study (which this is), and after the Parish Council has given it's approval. This schedule has been coordinated to ensure the public phase of the campaign does not conflict with other major asks, including Parish Stewardship and the Annual Catholic Appeal.

In order to raise the maximum amount of funding, counsel recommends conducting the 'silent' leadership phase prior to the formal campaign kick-off. The timeframe the parish chooses will ultimately depend on the amount of time necessary to absorb and act upon the information in this report, as well as beginning the proper cultivation of leadership-gift prospects so vital to the success of the campaign. Otherwise, counsel presumes, as this is a positive study, the campaign will go forward as planned.

(1.) Prior to Fundraising:

Before initiating a capital campaign, counsel recommends that the leadership of Sacred Heart Parish address the following:

- (a.) Ask any questions about the findings or recommendations outlined in this report;
- (b.) Identify the overall financial potential of the parish;
- (c.) Secure/finalize any needed architectural materials;
- (d.) Identify possible campaign leadership for committees; and
- (e.) Identify new leadership gift prospects in addition to traditional sources for this level of giving

(2.) Parish Communications:

In order to build a base of support for all future parish fundraising and stewardship efforts, counsel recommends the parish and school develop a long-term communication plan and means of communicating its mission for the future. In order for Sacred Heart Parish to expand its donor base beyond its group of loyal supporters and instill within all parishioners a spirit of sacrificial giving, education and regular communication are necessary. Communicating the plans to the parishioners could include pulpit announcements, bulletin notices, open meetings, etc. Homilies are also effective but, as study participants cautioned repeatedly, these should be employed judiciously.

(3.) Feasibility/Planning Study Results:

Once a final course of fundraising action has been agreed upon, those persons who took part in the study should be notified of the future steps that Sacred Heart Parish will take and thanked for their participation. Counsel recommends waiting until after the parish leadership has read, analyzed and discussed the report findings and determined the next steps before sharing the results of the report with the greater parish community. In the meantime, a notice of this fact should be placed in the bulletin. In addition, this report should be made available to the parishioners and staff, especially to those that participated in the personal interviews.

Through this report and other interaction with parishioners, Fr. Ritter and the parish leadership are cognizant of the economic concerns many parishioners have. In campaign-related communications, efforts will be made to assure parishioners that the parish is aware of this. These concerns will also be taken into consideration as parishioners are asked for financial support of the campaign at all levels.